



**Taxpayer Communications Committee
Taxpayer Advocacy Panel (TAP)
Meeting Minutes
Thursday, June 08, 2023**

Designated Federal Officer

- Susan Jimerson TAP West Chief

Attendance

- | | | |
|-----------------------|--------------------|------------|
| • Richard Bell | Corpus Christi, TX | Member |
| • Denise Besson | Trufant, MI | Chair |
| • Michelle Brookens | Taylorville, IL | Vice Chair |
| • Candace Smith | Mustang, OK | Member |
| • Joanne Thurston | Marietta, GA | Member |
| • James (Jim) Wiseman | Brentwood, TN | Member |
| • Melanie Almeida | Sandpoint, ID | Member |

Members Absent

- | | | |
|-----------------------|--------------|--------|
| • Ruth Guyon | Bellevue, NE | Member |
| • Tracey Randall-York | Ontario, CA | Member |

Staff

- | | |
|---------------------|------------------------------|
| • Frank Bustos | Acting, TAP Director |
| • Conchata Holloway | TAP Program Analyst |
| • Hannah Jair | TAP Program Analyst |
| • Rosalind Matherne | TAP Program Analyst |
| • Annie Gold | TAP Administrative Assistant |
| • Mejbeen Balsara | W&I |

Quorum

A quorum was met.

Welcome and DFO Report

Susan Jimerson opened the meeting and welcomed everyone to the call. Overview of the Agenda was shared. Members were thanked for a job well done during the Face-to-Face (FTF) meetings. The following meeting dates were provided:

- June 20, 2023, ICC beginning at 12:00 PM, EST
- June 21, 2023, Outreach beginning at 11:00 AM, EST
- June 26, 2023, Joint Committee beginning at 3:00 PM, EST



- Members were reminded to forward all information pertaining to the FTF travel over to Annie Gold to ensure timely reimbursements

National Office Update

Frank Bustos welcomed members and expressed how pleased it was to meet and get to know them during the FTF meeting. Members were reminded how valuable the information they provide is to TAP. He was asked to draft a request for TAP with a recommendation consideration expediting priority for the Internal Revenue Service functions. Over the course of the week, he drafted a piece that will be included in the June Report to Congress requiring all the functions of IRS to begin agreement with TAP within in forty-five days of the recommendations being submitted. Erin Collins, National Taxpayer Advocate stated the TAP contributes valuable information and a timely response from IRS is expected. Bustos report out will be available within the next couple of months.

Chair Report

Denise Besson greeted everyone and shared the following:

- The FTF meeting was great. A lot was learned and accomplished
- A lot of issues were worked and closed

Minutes Approval

Conchata Holloway stated a correction was made showing Issue # 54248 was approved for closure during the April 13, 2023, meeting.

- TCC May 16, 2023, Monthly Meeting Minutes approved

Besson motioned to approved and Michelle Brookens seconded

Public Comment

N/A

Program Owner Report

Mejbeen Balsara was having issues with TEAMS connections and could not comment. Rosalind Matherne shared a message from Balsara on how she enjoyed meeting members during the FTF meeting and is looking forward to working with everyone.

Subcommittee Report

Subcommittee 1

James Wiseman stated the FTF meeting was a great meeting. Subcommittee 1 had a joint meeting with Subcommittee 2 and they had a SME who did a presentation on measuring marketing. They also had a follow-up questions.

Subcommittee 2

Joanne Thurston stated she enjoyed being in Washington, meeting everyone face to face. She expressed how the meetings gave a new dimension, and creditability to the work being done. Members were thanked. Subcommittee 2



met with Subcommittee 1 as stated in Wiseman's report. They have gone through over one hundred projects. Meeting with Subcommittee 2 the SME provided ideas on how to tell if Outreach being done is working. He provided a lot of ideas.

Screening Committee Update

Besson informed the committee the Screening Committee reviewed 102 issues: Closed 89 issues, transferred 8 to different committees, and 5 issues remaining to divide between the subcommittees and let the Leads know. Holloway will double check the Screening Report and send out to the Leads.

Brookens made the motion to approve the Screening Report and Wiseman seconded

Decision: Full Committee Consensus approve the Screening Report as submitted

Outreach Report

Brookens stated she enjoy the meeting everyone during the FTF and shared the following:

- The Outreach Committee does not have anything going on for the month of May. Their next meeting is scheduled for June 21, 2023, beginning at 11:00 AM, EST. Members were encouraged to attend every third Wednesday of the month
- A Social Media guide is available for questions pertaining to Outreach
- Members were encouraged to post all activities onto their activity reports. Currently, two members have posted activities from the FTF meeting. Members reminded to post meetings, email readings, etc. Keep track of hours monthly and focus on the younger demographic such as high schools, colleges, community colleges, military personnel and incarcerated re-entry individuals
- The total Activity hours 190.75. Three people have reported
- Jimerson added, members who attended the FTF meetings all of those hours account towards Outreach. Members were encouraged not to cut short their hours
- Holloway added to make sure to select TCC. Hours entered after May 31, 2023, may not show on the report
- Brookens added to make sure and select the option for Annual Meeting on the report to enter hours

Internal Communications Committee



Besson stated the ICC is working on the SpeakUp Brochures with the proposal forwarded for approval. They are also working the Facebook page. Jimerson added the Communications Staff to get into the draft format to approve at the next ICC meeting. Conversation was held on revising some of the language. Melanie Almeida added the intent is there, but the approach is different. It is more welcoming. Individuals reading would feel more invited to participate rather than provided information as to what TAP is.

A QR code will be added to the SpeakUp Brochures and will be linked directly to the www.ImproveIRS.org and the Taxpayers Bill of Rights. They are anticipating publication during the month of September.

Action Items

Holloway shared the following Action items:

- Forward TCC May reading minutes approved with corrections to Kevin Brown for posting
- Issues from the Screening Committee will be transferred to the appropriate project committee, remaining issues will be closed and double check to make sure the subcommittee is the one agreed to
- Activity records are generally sent to the Analyst by the end of the month. The cumulative report will be done on June 30, 2023. Members will have all hours entered. Members were reminded to update their Activity Reports
- The Newsletter article will be Melanie Almeida by June 23, 2023, to post. Any member with information to add to the Newsletter should forward to Holloway and copy Almeida
- Follow up with Rosalind Matherne on a couple of outstanding questions and issues
- Members were reminded to reach out to Holloway with any ideas and/or questions

Roundtable

- Almeida stated she will summarize the pieces from the Screening Committee for status update. Questions on whether www.TAPSpace.org has been resolved. Holloway stated there were some issues but should be resolved. Members who may be having issues were advised to contact Holloway
- Wiseman will work with him to print his cumulative report
- Joanne Thurston suggested to invite the person who creates the forms
- Jimerson added the FTF meeting was the first-time members were able to come together and comments in the Newsletter are encouraged whether good or just what was thought about the FTF. Comments can be forwarded to Almeida

Jimerson thanked everyone for joining the call.



Close

The meeting was officially closed at 12:40 PM, EST.

**Next Meeting: Thursday, July 13, 2023
12:00 PM EDT, 11:00 AM CDT, 10:00 AM MDT, 9:00 AM PDT**

These minutes have been approved and certified by the committee chairperson.